

The Daihatsu Copen, Page 6



2 **Parts Purchases**
Sales of U.S. Parts to Japanese Automakers Remain Steady

5 **Alliance Partners Increase Ties**
GM Partners Share in Parts Buying

6 **EXECUTIVE HIGHLIGHTS**
Meet Takaya Yamada, Daihatsu Motor Co., Ltd. President

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COMMENTARY

THE CHANGING SIGNIFICANCE OF AUTO PARTS PURCHASING DATA



William C. Duncan, Ph.D.
General Director, JAMA USA

The Japan Automobile Manufacturers Association (JAMA) recently released its U.S. Auto Parts Purchasing Report (see article, page 2). This annual report was designed in 1987 to demonstrate the degree to which Japanese companies are globalizing their operations.

The parts purchasing data reported over the past 16 years clearly reflects a sustained globalization trend. JAMA members' purchases of U.S. auto parts expanded steadily from \$2.5 billion in 1986 to about \$36 billion last year. This corresponds to the growth in their investment in the U.S. For example, in 1986 the Japanese auto companies produced 617,000 vehicles in the U.S. and imported 3.4 million. Since then, Japanese companies have invested some \$20 billion in U.S. plants and equipment, increased their U.S. production by 1.6 million units and reduced their imports into the U.S. by approximately the same number. The parts purchasing numbers reflect these trends.

However, the further we move ahead in this era of global interaction among the world's auto manufacturers, the more the auto parts purchasing report inadequately represents the degree of globalization taking place and the less it fulfills its originally intended purpose. Consider the following:

- The purchasing numbers do not

COMMENTARY—Continued, Page 2

Toyota and Honda First Out of the Gate

Automakers Announce Plan to Market Fuel Cell Vehicles in U.S. and Japan

Toyota Motor Corp. and Honda Motor Co. recently announced that they would begin limited leasing of fuel cell vehicles in the U.S. and Japan, becoming the first in the world to offer the technology commercially.

Surprising just about everyone, Toyota was the first to announce that it would begin leasing sport utility vehicles to government agencies, research institutions and energy companies from the end of the year. The models it plans to offer, which are based on the Kluger-V in Japan



The Toyota FCHV-4 (test car)

and the Highlander in the U.S., have a top speed of more than 150 kph (90 mph). Toyota had previously said it would begin marketing its fuel cell hybrid later in 2003.

TOYOTA AND HONDA FIRST—Continued, Page 2

Creating the Infrastructure

Popularizing Fuel Cell Vehicles Requires More than Producing a Vehicle

Acclimating the public to fuel cell powered transportation will involve more than simply manufacturing vehicles. A host of industries and government agencies must set standards and create the infrastructure needed to support the technology.

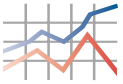
Japanese automakers, government agencies and several other private sector organizations are launching a variety of programs aimed at ultimately doing just that— further testing the technology and laying the foundation for supporting fuel cell powered transportation in the future.

In October, the Ministry of Economy,

Trade and Industry (METI) and two other organizations will kick off their 3-year "Japan Hydrogen Fuel Cell Demonstration Project" aimed at showing that hydrogen is safe, effective and environmentally friendly. A second objective is demonstrating how to operate the infrastructure needed to distribute hydrogen fuel. METI is paying 2.5 billion yen (\$21.5 million) for the project and a companion program that tests fuel cells as power sources for homes and businesses at a dozen locations around the country.

Toyota Motor Corp., Honda Motor Co.,

CREATING THE INFRASTRUCTURE—Continued, Page 3



COMMENTARY—Continued From Page 1

include in-house production of auto parts by JAMA companies in the U.S., only outside purchases. Therefore, they do not include millions of engines, transmissions and other value-added parts, which the JAMA companies are increasingly producing in the U.S. rather than importing from Japan.

- The numbers do not take into consideration purchases from other countries. For example, last year purchases of U.S. parts for use in Japan decreased by 13 percent, but purchases of parts from Europe increased by 17 percent.
- As more overseas parts companies set up shop in Japan, their Japan-based production will substitute for imported products from the U.S. and elsewhere.
- The purchasing numbers neither reflect the new capital relationships brought about by globalization, nor do they reflect the new joint-purchasing arrangements derived from them. For example, GM, Ford, DaimlerChrysler and Renault have equity and management participation in seven of the nine

Japanese car manufacturers. GM Japan, now a member of JAMA, recently announced that it would form a joint Japan-based purchasing team to seek auto parts worldwide for GM and three of its Japanese partners—Isuzu, Subaru and Suzuki (see story, page 5).

As Japanese auto investments in the U.S. mature, parts-purchasing trends in the U.S. are more likely to reflect changes in economic conditions and competitiveness than the growth of investment, U.S. content and globalization.

The Future

The annual auto parts purchasing report serves a useful role as an historical measure of the rapid internationalization and integration of the Japanese automobile industry into the U.S. economy. However, this data loses its usefulness in a world where it is virtually impossible to distinguish a car based on the nationality of its parts. As we move into the future, the industry will focus on improvements in productivity, production technology, new drive-train innovations, quality, and most of all, consumer satisfaction. It then makes more sense to focus on how auto parts contribute to these developments rather than on how to determine the dollar value of their nationality.

Your thoughts and views about this commentary are welcome. Please send them to me at wd@jama.org or by fax to 202-872-1212.

Toyota and Honda First

Continued From Page 1

A few weeks later, Honda announced that it had become the world's first company to obtain approval from the U.S. government and the state of California to sell the FCX, equipped with hydrogen tanks large enough to power it for 355 km (215 miles) on a single fill. Its top speed is 150 kph (90 mph). The company added that it expected to receive approval from the Japanese government shortly and that it hoped to sell or lease about 30 units over the next 2 to 3 years.



Honda plans limited marketing of its FCX.

The limited offerings reveal a great deal about the state of the fledgling fuel cell industry (see related story, page 1). "In addition to the limited system for supplying hydrogen, we still lack the test and other data to accommodate fuel cell cars in a variety of different environments," Toyota Vice President Akihiko Saito said.

Consequently, both companies are uncertain about when they will begin full-scale commercialization.

In the meantime, though, the companies said they would use the marketing experience as an extension of their research program. Honda said it is working to develop technology that will improve performance in cold weather. The great benefit of hydrogen fuel cells is that they emit only water vapor, but in cold weather that vapor can freeze inside the power unit and prevent it from starting.

GM and Nissan

General Motors Corp., which is spending \$100 million a year on developing fuel cell technology, said it too could market a fuel cell model, but would rather bring down manufacturing costs before it begins mass production. Currently, it takes considerable time for skilled technicians wearing gloves and laboratory gowns to assemble fuel cells.

In the meantime, GM announced that it would road test its HydroGen3 Opel Zafira fuel cell electric vehicle as part of the "Japan Hydrogen Fuel Cell Demonstration Project" sponsored by the Ministry of Economy, Trade and Industry (METI). The company says the vehicle has a range of 400 km (250 miles) on a single fill, with a top speed of 150 kph (90 mph). Lately, Nissan Motor Co. has said it will commercialize a fuel cell vehicle in fiscal 2003, 2 years ahead of the planned 2005. ♦

PURCHASES OF U.S. AUTO PARTS REMAIN STEADY

Sales of American-made auto parts to Japanese automakers remained steady in fiscal 2001, despite Japan's economic decline and stiff competition from European and other overseas suppliers.

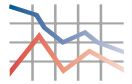
According to figures released by the Japan Automobile Manufacturers Association (JAMA) in July, U.S. companies sold \$35.66 billion in parts and materials to Japanese auto manufacturers, down just

slightly from the record \$35.78 billion sold during the preceding fiscal year.

Of the total, local procurement by Japanese-owned U.S. facilities accounted for an all-time high of \$32.20 billion, up 1 percent. Exports to Japan dropped to \$3.46 billion, a decrease of 13 percent from the previous fiscal year.

Before last year's slight decline, JAMA members had been increasing their purchas-





Creating the Infrastructure *Continued From Page 1*

Nissan Motor Co., DaimlerChrysler AG, General Motors Corp. and about 20 Japanese power utilities, natural gas suppliers and fuel refiners will participate in METI's program. In conjunction with the road tests, the Engineering Advancement Association of Japan will head an effort to establish five hydrogen fueling supply facilities in Tokyo and Kanagawa prefectures.

"Japan is a very important market for fuel cell vehicles," said Larry Burns, GM Vice President of Research and Development and Planning. "GM is making great progress in the development of fuel cell vehicles and we're very happy that the Japanese government, like other governments in Europe and the U. S., is taking a leadership role in this area."

Specifications and Standards

BMW, meanwhile, has said it wants to work with Japanese automakers to establish global standards for pipe specifications and other fueling equipment before the construction of hydrogen fueling infrastructures gets under way.

Japan's Land Ministry said it hopes to establish a set of safety standards for fuel cell vehicles by the end of 2004, covering parts unique to fuel cell powertrains like the hydrogen tank and the electric motors. The Ministry said it would attempt to



Nissan Motor Co. plans to participate in the "Japan Hydrogen Fuel Cell Demonstration Project" and has said it will commercialize a fuel cell vehicle, such as its Xterra FCV, in fiscal 2003, 2 years a head of the planned 2005.

General Motors Corp. plans to test its HydroGen3 Opel Zafira in the "Japan Hydrogen Fuel Cell Demonstration Project," which begins in October, with the hope of better understanding the technology and learning how to create a hydrogen infrastructure.



alleviate consumer fears about the safety of hydrogen storage tanks in collisions and the use of high voltages required for all-electric vehicles.

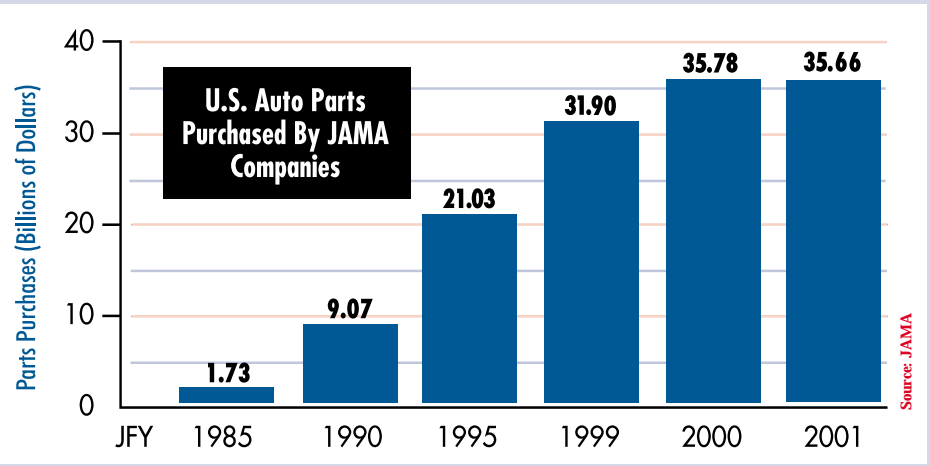
And Yakushima Denko Co., an affiliate of Taiheiyo Cement Corp., is leading a

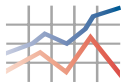
project to produce clean hydrogen fuel for export to the rest of the world. It proposes setting up small hydraulic power generators in Japan and using the resulting power to electrolyze water and produce hydrogen. ♦

3

es annually for more than 16 years. In 1986, for example, they bought only \$2.49 billion in U.S. auto parts. The steady increase reflects their investment in assembly plants and equipment in the U.S., Europe and elsewhere (see commentary, page 1).

Meanwhile, Japanese automakers have increased their purchases of European auto parts, jumping from \$4.9 billion in 1995 to \$6.8 billion in 2001. Last year, purchases of European parts by Japanese companies for use in Europe increased by 12 percent. Their purchases of European parts for use in Japan increased 17 percent. ♦





Safety Technologies Take Front and Center

International Conferences Reflect Focus on Safety

Consumer surveys show that safety features have become an increasingly important consideration in new car purchases. Accordingly, Japanese automakers have invested significant resources equipping their products with the latest safety advancements.

At a recent conference sponsored by the Society of Automotive Engineers of Japan, Takao Suzuki, Vice Chairman and President of the Japan Automobile Manufacturers Association, stressed the importance of safety innovations.

"We must develop active technologies to prevent any accidents from happening and passive safety features to keep damage at a minimum," he said. "Furthermore, engineers and researchers will be called upon to develop technologies which detect and warn of human errors, such as napping at the wheel."

This emphasis on safety has prompted Nissan Motor Co. to launch its "Real World Safety" campaign. It plans to install Active Head Restraints, which can help reduce the incidence of neck injuries when a vehicle is hit from behind, in all passenger and recreational vehicles by fiscal 2004

and all commercial vehicles weighing less than 2.8 tons by fiscal 2005.

"We must develop active technologies to prevent any accidents from happening and passive safety features to keep damage at a minimum."

**—Takao Suzuki
Vice Chairman, JAMA**

In addition, the company announced that it would install SRS curtain airbag systems in most of its passenger and recreational vehicles and fully computerized brake-by-wire systems in its passenger vehicles by 2005. The next generation braking systems already are used in European luxury cars and Toyota uses them in the Estima hybrid in Japan.

Given the focus on safety, it seems fitting that the 18th International Technical Conference on the Enhanced Safety of Vehicles (ESV) would be held in Nagoya, Japan, on May 19-22, 2003. Held biannually since the early 1970s, the U.S.

Department of Transportation-sponsored conference brings together about 800 representatives from government agencies, industry and safety advocacy groups worldwide to discuss research findings and advanced technologies related to automobile safety.

Now co-sponsored by two Japanese government ministries, the ESV conference has been held in Japan twice before; however, the last meeting occurred 20 years ago and automobile technologies have advanced significantly since 1982.

The current trend is toward "smarter and more sophisticated automobiles" and the conference will reflect that, said Joseph Kianianthra, Associate Administrator for Applied Research in the department's National Highway Traffic Safety Administration.

"We're expecting a lot of very interesting research reports, exhibits and displays from automobile manufacturers, their suppliers and other safety experts from the Asia-Pacific region, given the location of the conference," he said. "It should be a stimulating exchange of information as well as a feast for the eyes." ♦

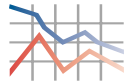
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▼ **Safety technologies, including these crash dummies used to test seat belts and other safety features, have improved dramatically over the past 20 years.**



▲ **Visitors try out safety innovations on display at the Automotive Engineering Exposition, sponsored recently by the Society of Automotive Engineers of Japan, Inc.**





Alliance Partners Increase Ties

Although the world's auto industry has become increasingly more competitive, that hasn't stopped the major manufacturers from strengthening their international alliances.

Leading the way is General Motors Corp. The world's largest automaker and its three Japanese affiliates—Fuji Heavy Industries, Isuzu Motors Ltd. and Suzuki Motor Corp.—are setting up the Alliance Purchasing Team to help reduce costs. The joint operation will buy parts and materials, including glass, wheels, steel, precious metals, generators and speakers, valued at about \$1.4 billion or 11 percent of the total annual procurement by the companies.

One of GM's Japanese partners also is augmenting its share in GM's recent acquisition—South Korea's Daewoo Motor Co. Suzuki plans to invest \$89 million, which translates into a 14.9 percent share. The GM Group will take a 67 percent combined stake.

Other Ties

GM isn't alone in its efforts to strengthen ties with its partners. Renault SA, which earlier this year increased its stake in Nissan to 44.4 percent, also wants to jointly buy a greater proportion of components with its Japanese partner. Currently, the two buy \$15 billion in new parts, but they would like to increase that to about \$21 billion a year.

By 2005, the two companies hope to be making half of their cars on joint platforms, cutting operating overheads and allowing them to jointly buy even more parts. If all goes as planned, the majority of the automakers' output would be based on 10 joint platforms, eight families of engines and seven common powertrains.

Japan's largest automaker, Toyota Motor Corp., meanwhile, has agreed to supply up to 20,000 diesel engines per year to BMW's new Mini brand. Toyota makes the engine for its own European subcompact, the Yaris, and would ship the engine from its production facility in Japan to the United Kingdom. ♦

Snapshots

Nagoya: The City of Shoguns*, Castles and Toyotas

Editor's Note: In this issue, we explore Nagoya, the site of the 18th International Technical Conference on the Enhanced Safety of Vehicles (ESV).

Home to Toyota Motor Corp., Noritake Company Ltd., Brother Industries, Ltd. and many other brand-name companies, Nagoya lies at the center of Japan's industrial heartland in the Aichi Prefecture.

The city produces 2 percent of the world's total manufactured goods and its gross output of automobiles, electronics, textiles and aerospace products accounts for 1.3 percent of the world's GNP, proving that Nagoya is equal to the Netherlands or Australia in its economic might. The city's 2 million residents also benefit from that wealth. They enjoy the highest disposable income in Japan.

They also enjoy a sizeable tourist trade due to the number of conferences held there annually. In addition to the vehicle safety meeting that U.S. and Japanese agencies will co-host in 2003, Nagoya will be the site of Expo 2005, an international conference of government, industry and private organizations intended to explore the influence of globalization and information technology on local cultures and the environment. Fifteen million visitors are expected to attend the Expo between March 25 and September 25, 2005.

The city isn't just an economic powerhouse, though.

Rich in history and culture, the city has remained a crossroads of Eastern and Western Japan since its founding more than 400 years ago by Japan's famous Shogun*, Tokugawa Ieyasu. He built the Nagoya Castle and adorned the roof with golden carps, which remain a symbol of the city today.

In addition to its famous ruling families, Nagoya is known for its arts. Since the Edo Period in the 17th century, Nagoya has evolved into a center for Noh and Kabuki theater, Japanese dance, the tea and incense ceremonies and flower arrangement. ♦

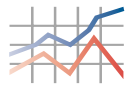
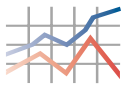
* Shogun is the term used for the military leaders of Japan during Japan's feudal period from the late 12th through the mid-19th century.

5

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EXECUTIVE HIGHLIGHTS

Takaya Yamada, President of Daihatsu Motor Co., Ltd. The Small Car Specialists

Although Daihatsu Motor Co., Ltd. has more competitors these days, the company believes its heritage of making small cars will prevail as it works to expand its current 27.6 percent share of the growing small and mini car market. Daihatsu takes responsibility globally for certain small car operations of the Toyota Group.

“Our fundamental strategy is to continue concentrating our resources on our core businesses, namely mini cars and other small vehicles,” said company President Takaya Yamada in Daihatsu’s 2002 annual report. “The outlook is favorable for smaller cars around the world due to rising concerns about the environment and to increasing car ownership in emerging countries.”

Although opportunity exists, Yamada is quick to point out that Daihatsu must pursue a highly focused business and marketing strategy. It must strengthen its domestic operations, invest more resources in its overseas production operations, cut production costs to increase profits, improve safety features and introduce new models that are comfortable, yet innovative in design.

It appears the company is off to a good start with its recently launched Copen convertible, a sports car-type mini. Just one month after the company introduced the new model, the Copen attracted 5,000 orders—10 times the company’s monthly



target of 500. The biggest challenge now is in meeting the burgeoning demand, which hasn’t subsided since its debut on June 19.

The little two-seater is just part of the equation, said Yamada, who began his career in 1964 when he joined Toyota Motor Corp., which holds a 51.2 percent stake in Daihatsu.

The company is bolstering its sales network and profit margins. By the end of last year, for example, Daihatsu had merged some of its sales companies to eliminate redundancy. Now, the company is looking at ways to promote greater cooperation among these outlets, with the hope of creating operations that are more efficient.

For small car manufacturers like Daihatsu, finding ways to build low cost

cars is perhaps even more critical to their long-term success. Daihatsu plans to increase outsourcing and is streamlining its organizational structure. It has even formed a Cost Planning Promotion Committee and charged it with targeting costs across the entire organization. “Nothing is sacred with this committee,” Yamada said.

On the international front, Daihatsu is just as ambitious. “The centerpiece of our overseas strategy is continued emphasis on expanding overseas manufacturing, chiefly in Malaysia, Indonesia and China,” he said. The company is looking for other opportunities, too. In an alliance with Toyota, for example, Daihatsu established manufacturing operations in Pakistan and Venezuela and hopes to extend its cooperative ventures in India, too.

Although challenges exist, Yamada believes Daihatsu has what it takes to survive. “We believe Daihatsu has all the elements required to become the preeminent name in the small car industry.” ♦

The Daihatsu Copen



QUOTES OF NOTE

Ron Harbour, President, Harbour & Associates, *Business Week*, July 15, 2002.

“Essentially, the customer is deciding who’s going to thrive and who’s not.”

Raymond Grigg, CEO, GM Japan Ltd., *Automotive News*, July 22, 2002.

“From an alliance perspective, the Cruze has been a win-win.”

Jean-Baptiste Duzan, Chairman and Managing Director, Renault-Nissan Purchasing Organization, *Automotive News*, August 5, 2002.

“We are finding that we are moving toward greater commonization with more speed than we originally expected.”

WHAT'S HAPPENING IN THE MARKET

- Total import sales rose 0.4% against a 2.1% rise in overall car sales.
- Imports from non-Japanese companies rose 1.0%, while imports from Japanese companies fell 9.3%.
- Imports of Ford vehicles rose about 0.4%, while those of GM and DaimlerChrysler fell 24.6% and 16%, respectively.
- Imports of VW, BMW, Peugeot, Hyundai/Kia, Honda and Fiat vehicles also rose.

NEW IMPORTED PASSENGER CAR SALES IN JAPAN: JANUARY THROUGH JUNE 2002 vs. 2001

	Percent Change 2002/2001	Total Cars 2002	Total Cars 2001
GENERAL MOTORS			
Chevrolet	17.7%	2,592	2,203
Cadillac	-31.1%	608	883
Saturn	-98.8%	6	516
Opel	-30.3%	5,007	7,156
Saab	-35.3%	673	1,040
Other	-8.3%	44	48
SUBTOTAL	-24.6%	8,930	11,846
FORD			
Ford	-14.0%	3,006	3,495
Volvo	-4.2%	7,997	8,345
Land Rover	-32.0%	1,083	1,592
Jaguar	109.1%	2,702	1,292
Aston Martin	-29.4%	12	17
SUBTOTAL	0.4%	14,800	14,741
DAIMLERCHRYSLER			
Chrysler	-23.7%	3,205	4,199
Mercedes-Benz	-19.7%	21,502	26,766
Smart	41.9%	3,181	2,242
SUBTOTAL	-16.0%	27,888	33,207
VW			
VW	-2.1%	31,497	32,170
Audi	73.3%	5,540	3,196
Other	-43.8%	63	112
SUBTOTAL	4.6%	37,100	35,478
BMW			
BMW	-1.8%	17,696	18,021
Mini	1,123.9%	4,039	330
SUBTOTAL	18.4%	21,735	18,351
PORSCHE			
	-15.4%	1,117	1,320
RENAULT			
	-15.4%	1,178	1,393
PSA			
Peugot	21.3%	7,124	5,871
Citroen	4.0%	518	498
SUBTOTAL	20.0%	7,642	6,369
FIAT			
Fiat	-37.3%	1,192	1,902
Alfa Romeo	63.2%	3,941	2,415
Ferrari	-11.1%	224	252
Other	-46.5%	38	71
SUBTOTAL	16.3%	5,395	4,640
ROVER			
	-70.2%	148	497
TOYOTA			
	-62.3%	446	1,184
HONDA			
	20.6%	5,085	4,216
ISUZU			
	-26.1%	1,265	1,711
HYUNDAI/KIA			
	298.4%	1,239	311
OTHERS			
	152.2%	3,105	1,231
GRAND TOTAL IMPORT SALES			
	0.4%	137,073	136,495
(Imports from Japanese Companies)			
	-9.3%	6,797	7,494
(Total Less Imports from Japanese Companies)			
	1.0%	130,276	129,001
GRAND TOTAL CAR MARKET SALES			
	2.1%	2,281,990	2,235,965

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- The small/mini-car share of the Japanese car market rose by 2.2 percentage points to 85.4% for the first 6 months of 2002 compared with the same period in 2001.
- The small/mini-car share of the import car market rose by 2.3 percentage points to 19.3%.
- The result is that 80.7% of imports are large cars in a market dominated 85.4% by small/mini cars.

—by MAJOR MARKET SEGMENT: JANUARY THROUGH JUNE 2002

		Small Car Ratio (B/A)	Total Cars (A)	Small/Mini Cars (B)	Large Cars (C)
GENERAL MOTORS					
	Chevrolet	0.0%	2,592	1	2,591
	Cadillac	0.0%	608	0	608
	Saturn	50.0%	6	3	3
	Opel	50.0%	5,007	2,503	2,504
	Saab	0.0%	673	0	673
	Other	0.0%	44	0	44
	SUBTOTAL	28.1%	8,930	2,507	6,423
FORD					
	Ford	0.2%	3,006	6	3,000
	Volvo	0.0%	7,997	0	7,997
	Land Rover	0.0%	1,083	0	1,083
	Jaguar	0.0%	2,702	0	2,702
	Aston Martin	0.0%	12	0	12
	SUBTOTAL	0.0%	14,800	6	14,794
DAIMLERCHRYSLER					
	Chrysler	0.0%	3,205	1	3,204
	Mercedes-Benz	0.0%	21,502	3	21,499
	Smart	100.0%	3,181	3,181	0
	SUBTOTAL	11.4%	27,888	3,185	24,703
VW					
	VW	24.4%	31,497	7,696	23,801
	Audi	0.1%	5,540	4	5,536
	Other	0.0%	63	0	63
	SUBTOTAL	20.8%	37,100	7,700	29,400
BMW					
	BMW	0.3%	17,696	46	17,650
	Mini	100.0%	4,039	4,039	0
	SUBTOTAL	18.8%	21,735	4,085	17,650
PORSCHE					
		0.6%	1,117	7	1,110
RENAULT					
		69.0%	1,178	813	365
PSA					
	Peugot	65.0%	7,124	4,634	2,490
	Citroen	8.9%	518	46	472
	SUBTOTAL	61.2%	7,642	4,680	2,962
FIAT					
	Fiat	98.5%	1,192	1,174	18
	Alfa Romeo	0.6%	3,941	25	3,916
	Ferrari	0.0%	224	0	224
	Other	52.6%	38	20	18
	SUBTOTAL	22.6%	5,395	1,219	4,176
ROVER					
		95.3%	148	141	7
TOYOTA					
		1.6%	446	7	439
HONDA					
		35.3%	5,085	1,794	3,291
ISUZU					
		0.0%	1,265	0	1,265
HYUNDAI/KIA					
		0.0%	1,239	0	1,239
OTHERS					
		9.4%	3,105	293	2,812
GRAND TOTAL IMPORTS 2002 (6 months)		19.3%	137,073	26,437	110,636
GRAND TOTAL IMPORTS 2001 (6 months)		17.0%	136,495	23,158	113,337
GRAND TOTAL CAR MARKET 2002 (6 months)		85.4%	2,281,990	1,948,480	333,510
GRAND TOTAL CAR MARKET 2001 (6 months)		83.2%	2,235,965	1,860,217	375,748

Note: Small/mini cars—engine size 2,000 cc and below; large cars—greater than 2,000 cc. Totals include mini-car sales.